EXHIBIT 21

DSP Report, Wave 4

Analysis for DoubleClick Bid Manager

2018

Advertiser Perceptions™

What Advertisers Think™

The More You Know
The Stronger Your Brand
The More You'll Sell™

GOOG-AT-MDL-009555706

Methodology and respondent profile

Representing Top 200 Advertisers in the U.S.

amazon, at&t, IBM, Carnival, Coca-Cola, McDonald's, DIAGEO, Kraft Heinz, LVMH, Apple, MillerCoors, Ford, Johnson & Johnson, SUBWAY, verizon, Google, L'OREAL, NIKE, pepsi, 21st Century Fox, VISA, macy's, SAMSUNG, Unilever, AstraZeneca, Microsoft, Capital One, Pfizer, Walmart, COMCAST, Disney

Leading Ad Categories

- Automotive
- Parenthood Related
- Consumer Electronics
- Consumer Packaged Goods
- Education
- Entertainment
- Financial Products/Services
- Home & Appliance
- Liquor, Beer and Wine
- Apparel/Fashion
- Toiletries & Cosmetics
- Pharmaceuticals
- Quick Service Restaurants
- Retail
- Technology
- Telecommunications
- Travel

700+ Key Decision Makers

- Sample: Marketer and Agency contacts from The Advertiser Perceptions Media Decision Maker Database and third-party databases as needed.
- Main Qualification: Involved in the purchase of programmatic advertising; Used or Worked with DSPs or DMPs in the past year.
- Fielded: January 2018
- Incentives include cash & data

Respondents totals:
- N=395 DSP Report
- N=345 DMP Report

Mean annual digital spend:
- $20.8 Million

Ranging in title:
- 48% VP and above
- 35% Director/Supervisor
- 17% Manager/Planner/Buyer

Expressing opinions from:
- 51% Agencies
- 49% Marketers

Advertiser Perceptions 2

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Respondents by verticals:
Largest share: FinServ, Tech, CPG, Retail

Vertical	%
Financial Products/Services	37%
Technology	32%
Consumer Packaged Goods	30%
Retail	30%
Consumer Electronics	26%
Entertainment	26%
Automotive	24%
Telecom	20%
Travel	19%
Home and Appliances	18%
Men's Apparel	18%
Liquor, Beer and Wine	17%
Education	16%
Pharma & Remedies (OTC and DTC)	16%
Baby, Child or Parenthood Related	16%
Women's Apparel	15%
Men's Toiletries & Cosmetics	13%
Women's Toiletries & Cosmetics	12%
Quick Service Restaurants (QSR)	11%

Advertiser Perceptions   3
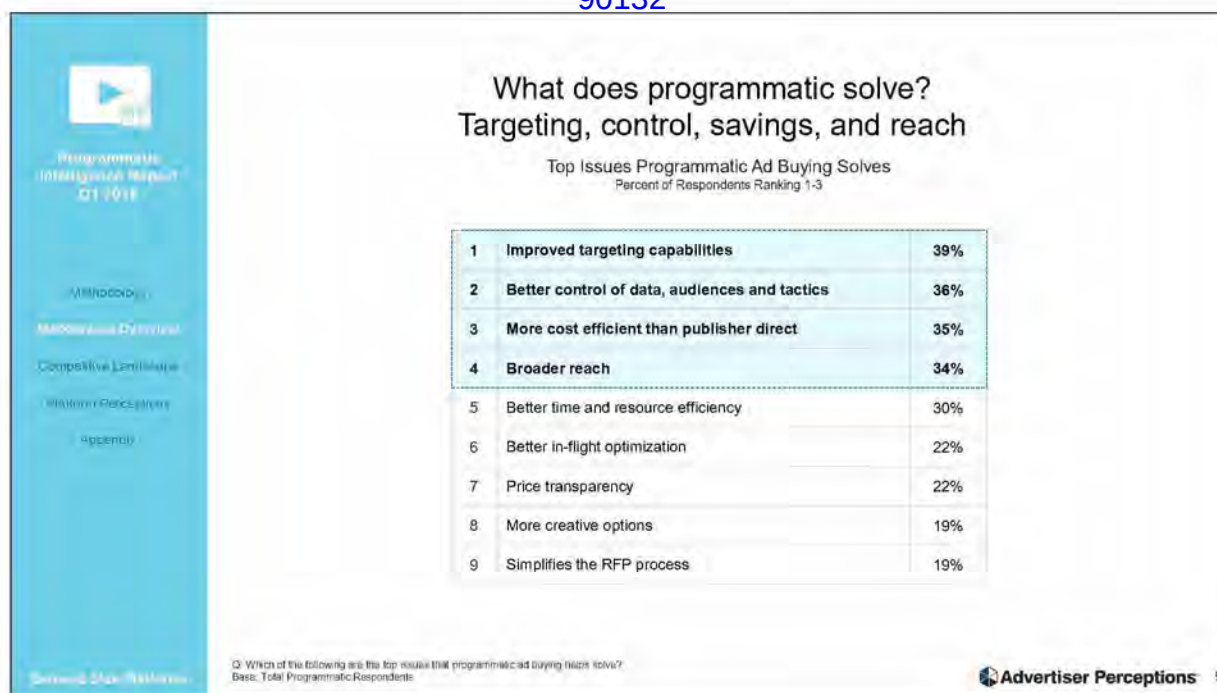
QS60

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GOOG-AT-MDL-009555709

Q20

Q50

GOOG-AT-MDL-009555711

Q50x1, Q50x2

Q106

Q40

What is thwarting programmatic? It's a matter of trust

Most Negative Aspects of Programmatic Ad Buying (Top 10)
Percent of Respondents Ranking 1-3

			% Point Change from Prior Wave (June 2017)
1	Fraud	36%	-3
2	Verification	26%	1
3	Brand safety	24%	-2
4	Poor inventory quality	22%	2
5	Placement Transparency	20%	0
6	Lack of human interaction	19%	-3
7	Lack of targeting capabilities	18%	6
8	Pricing Transparency	18%	2
9	Expense of third party verification	18%	1
10	Data management complexity	17%	1

Q: Which of the following are the most negative aspects of programmatic ad buying?
Base: Total Programmatic Respondents

Advertiser Perceptions 10

Q40

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Q210

Q215

Q215

60% use DBM & AAP for "both" performance & brand ads
Of the remainder, a swing to brand for AAP & performance for DBM

Type of Campaign DSP Primarily Used For (Among Top 10 Used)
Percent of Respondents (Sorted by "both")

	Brand Campaigns	Both	Performance
amazon advertising Platform	24%	59%	17%
DoubleClick Bid Manager	16%	58%	25%
theTradeDesk	21%	58%	22%
Adobe Advertising Cloud	24%	55%	21%
Sizmek	24%	48%	28%
BrightRoll	22%	47%	31%
MediaMath	14%	47%	39%
AppNexus	19%	42%	39%
DSP	25%	39%	36%
TREMOR VIDEODSP	27%	32%	42%

← MediaMath: most performance-focused

Q: Among the Demand Side Platforms (DSPs) you have used in the past year, what type of campaigns will they primarily used for?
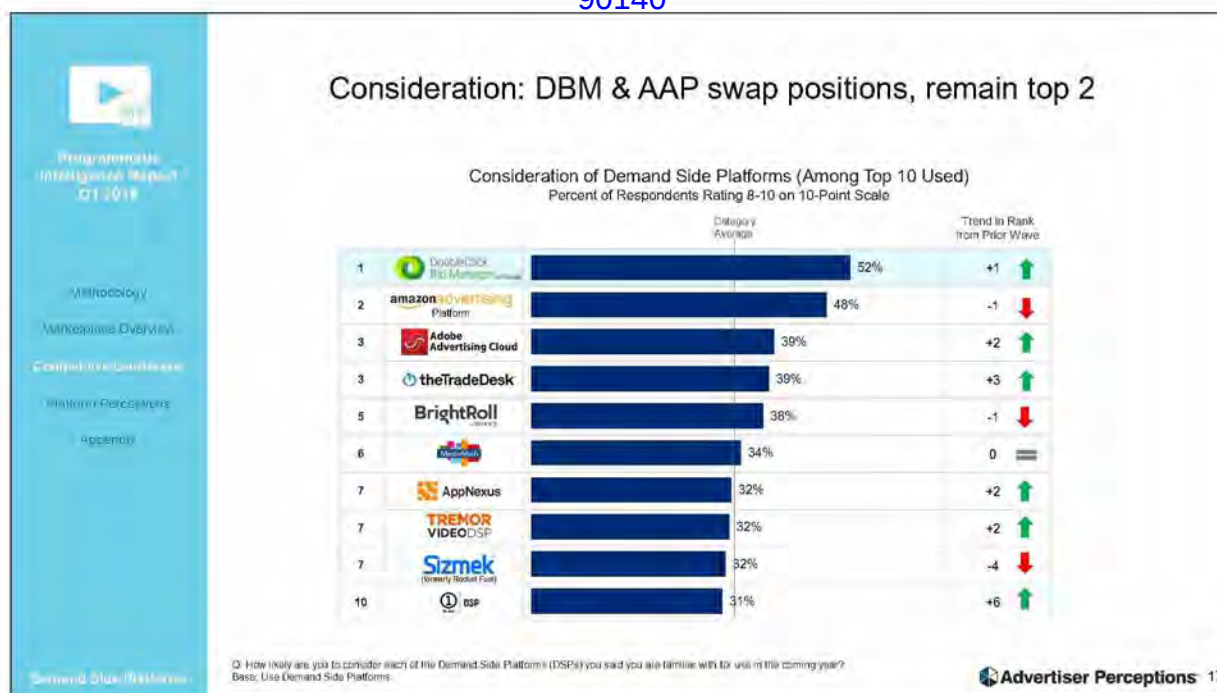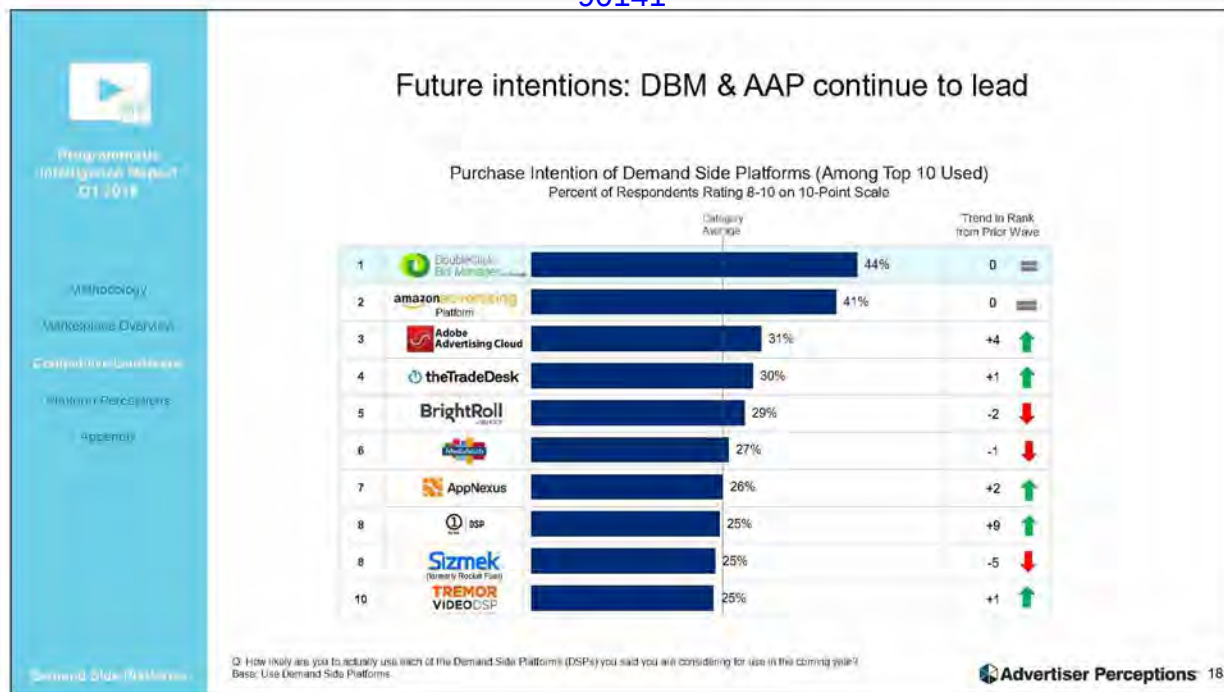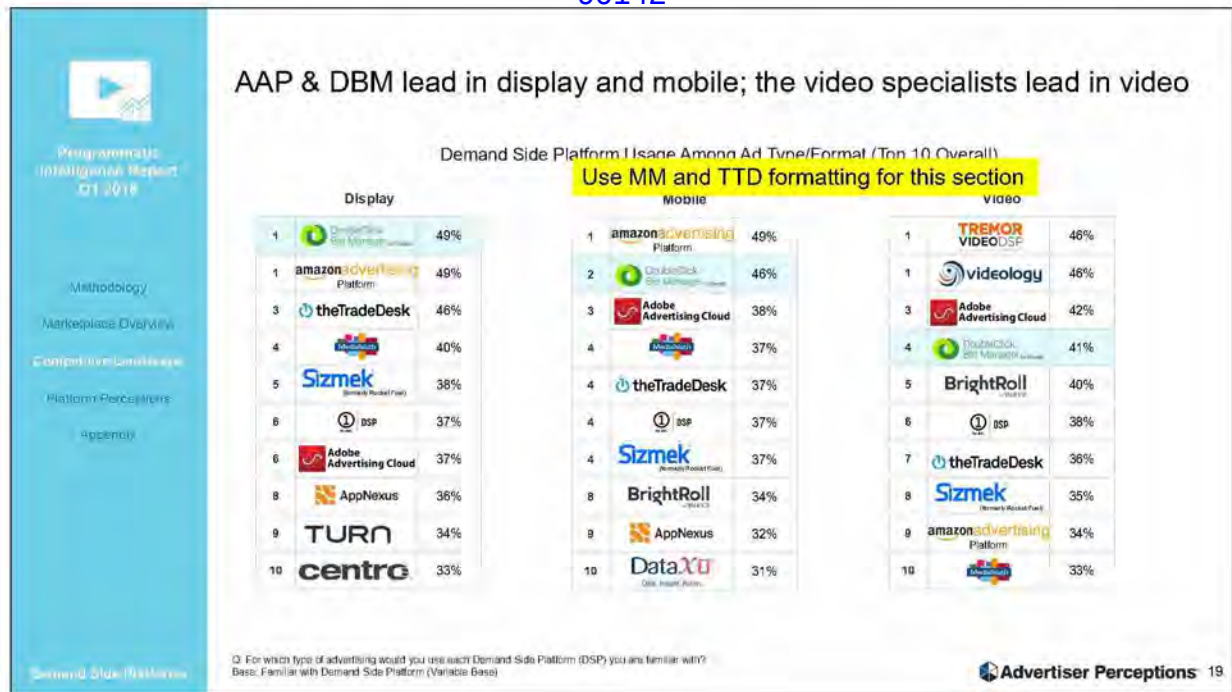Base: Used Demand Side Platform in Past Year (Variable Base)

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Q233a - NEW

Q220

Q225

Q232

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Q232

Q226

Q226

Q230

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Platform Perceptions

Advertiser Perceptions

What does DBM do especially well? Scale, expertise, analytics, expertise

> Recognized ==expertise, speedy implementation, best in class analytics and reporting.==
> - Marketer, VP

> Deliver audiences at ==scale== with a ==UI== that works well and have good on-going ==support.==
> - Agency Director

> They have the ==best return== based on our spending and can easily ==scale== our campaigns and focus on the best demographics to reach ==our targeted audience.==
> - Marketer, Director

> Industry-specific ==applications== that provide ==real-time accurate metrics== to our clients based on specified parameters.
> - Agency President

Q: What do they do especially well?
Base: Total Programmatic Respondents

Advertiser Perceptions 25

Q52c

Q52c

Q235, Q240, Q245

GOOG-AT-MDL-009555732

Q235

GOOG-AT-MDL-009555733

Q235

Of the 4 analytics and insights criteria, audience analytics is key

Index of "Key Drivers" Regression to Likely to Use

Audience Analytics	Post Ad Campaign Insights	Training and Application QA	Thought Leadership
137	125	117	21

Q: How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Total Respondents
Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) research and insights efforts in communicating its value as an advertising vehicle at each stage in the campaign.
Base: Considering Demand Side Platform in the Coming Year (Variable Base)
Regression Analysis is a statistical method designed to derive the relationship between characteristics and/or behaviors. Advertiser Perceptions utilizes regression analysis to show relationships between selection criteria and their influence on plans to buy. The analysis determines which criteria have the greatest impact on achieving the desired results.

Advertiser Perceptions 30

Q240

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Q240

Working with a DSP: what advertisers value most: be responsive and have tech expertise

Index of "Key Drivers" Regression to Likely to Use

Q245

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Q245

Q250
Meetings in person (Net) = 1) Had small group meeting in person with representative(s) from media brand OR 2) Had in person presentations on market topics or training
Video conference/phone/email (Net) = 1) Had technology enabled meetings/conferences on web, video, phone OR 2) Had email or phone conversations with sales rep(s)

GOOG-AT-MDL-009555739

Funnel metrics summary: Google & Amazon lead from familiarity to buying intention

Key Metrics Among Top 10-Used Demand Side Platforms
Percent of Respondents/Score

	Familiarity (8-10)			Usage			Consideration (8-10)			Buying Intention (8-10)			Net Promoter Score (NPS)	
1	DoubleClick Bid Manager	47%	1	DoubleClick Bid Manager	38%	1	DoubleClick Bid Manager	52%	1	DoubleClick Bid Manager	44%	1	MediaMath	33
2	amazon advertising Platform	42%	1	amazon advertising Platform	38%	2	amazon advertising Platform	48%	2	amazon advertising Platform	41%	2	Sizmek	26
3	BrightRoll	39%	3	BrightRoll	22%	3	Adobe Advertising Cloud	39%	3	Adobe Advertising Cloud	31%	3	Adobe Advertising Cloud	22
4	theTradeDesk	37%	4	Adobe Advertising Cloud	20%	3	theTradeDesk	39%	4	theTradeDesk	30%	4	theTradeDesk	22
5	Adobe Advertising Cloud	35%	5	theTradeDesk	18%	5	BrightRoll	38%	5	BrightRoll	29%	5	DoubleClick Bid Manager	22
6	MediaMath	33%	6	AppNexus	17%	6	MediaMath	34%	6	MediaMath	27%	6	amazon advertising Platform	16
7	Sizmek	32%	7	TREMOR VIDEODSP	16%	7	AppNexus	32%	7	AppNexus	26%	7	TREMOR VIDEODSP	14
6	AppNexus	31%	8	MediaMath	15%	7	TREMOR VIDEODSP	32%	8	DSP	25%	8	AppNexus	10
9	DSP	30%	8	Sizmek	15%	7	Sizmek	32%	9	Sizmek	25%	9	DSP	-5
10	TREMOR VIDEODSP	27%	10	DSP	13%	10	DSP	31%	10	TREMOR VIDEODSP	25%	10	BrightRoll	-13

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Key takeaways

Marketplace overview

- What does "in-house" mean to marketers? 3 variations

  - Two involve DSPs, one includes agencies

- Why is programmatic growing? Better targeting, leveraging data, efficiencies

- What is thwarting programmatic? It's a matter of trust

Advertiser Perceptions 36

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Key takeaways

Competitive landscape: DSPs

- DBM and Amazon most used DSPs
  - Usage: DBM leads with agencies, AAP with marketers
- 60% use DBM & AAP for "both" performance & brand ads
  - Of the remainder, a swing to brand for AAP & performance for DBM
- Future intentions: DBM & AAP continue to lead
- AAP & DBM lead in display and mobile; the video specialists lead in video
  - Adobe leads advanced TV, TTD audio and DBM native
- Who is the most preferred DSP?
  - AAP, followed by DBM
- Competitive NPS for Google but more neutrals than most

Advertiser Perceptions 37

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A Rose is a Rose:
What's in a Name?

Advertiser Perceptions

Q100a

What do people think Adobe Advertising Cloud is?

Methodology

Competitive Landscape

Platform Perceptions

Appendix

		% of respondents
1	Both DSP and DMP	32%
2	Ad Network	24%
3	Other/I Don't Know	19%
4	Supply Side Platform	13%
5	DMP	11%
6	DSP	10%
7	Agency Trading Desk	10%

Correct Categorization

Somewhat Correct Categorization

Q100a. How would you characterize the following brand?
Base: Total Programmatic Respondents

Advertiser Perceptions 43

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What do people think The Trade Desk is?

		% of respondents
1	Agency Trading Desk	33%
2	Both DSP and DMP	26%
3	Ad Networks	16%
4	Other/ Don't Know	15%
5	DSP	12%
6	Supply Side Platform	8%
7	DMP	8%

Correct Categorization

Methodology

Competitive Landscape

Platform Perceptions

Appendix

Q100a. How would you characterize the following brand?
Base: Total Programmatic Respondents

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Most see themselves as fairly well-versed in programmatic

Adoption Level of Programmatic Advertising
Percent of Respondents

Beginning: exploring as a programmatic marketer — 15%

Advanced: in a relatively advanced position with programmatic/technology-based advertising buying — 49%

Intermediate: somewhere in the middle of beginning and advanced — 36%

Q: Which of the following best characterizes [your agency's/your company's] experience and skills in programmatic?
Base: Total Programmatic Respondents

Advertiser Perceptions 45

Q25

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Q26 – NEW

Q50a
Wave 3 – Current 2018: 64% Having complete integration of the software and managing the programmatic buying of media and data usage, 36% Utilizing marketing or advertising technology partners to help manage the use of data to buy advertising programmatically

Q45

Q105, Q105a

Why is programmatic growing?
Better targeting, leveraging data, efficiencies

Appendix

Top Issues Programmatic Ad Buying Solves
Percent of Respondents Ranking 1-3

	AGENCIES		% Point Change from Prior Wave (June 2017)		MARKETERS		% Point Change from Prior Wave (June 2017)
1	Improved targeting capabilities	39%	-2	1	Improved targeting capabilities	38%	-8
2	More cost efficient than publisher direct	36%	0	2	Offers unique targeting data/opportunities	38%	+8
3	Better control of data, audiences and tactics	35%	-1	3	Better control of data, audience & tactics	37%	0
4	Offers unique targeting data/opportunities	35%	+1	4	Broader reach	34%	+2
5	Broader reach	33%	+7	5	Better time and resource efficiency	34%	-2
6	Better time and resource efficiency	26%	-8	6	More cost efficient than publisher direct	34%	+3
7	Better in-flight optimization	24%	+3	7	Price transparency	24%	+3
8	More creative options	21%	+7	8	Simplifies the RFP process	21%	-1
9	Price transparency	19%	-4	9	Better in-flight optimization	19%	-2
10	Simplifies the RFP process	17%	0	10	More creative options	17%	-5

Q: Which of the following are the top issues that programmatic ad buying helps solve?
Base: Total Programmatic Respondents

Advertiser Perceptions 50

Q35

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ATDs past and future usage levels: Cadreon leads the way

Usage of ATDs
Percent of Marketer Respondents

PAST USAGE			FUTRE INTENT TO USE		
1	CADREON	49%	1	CADREON	51%
2	XAXIS	40%	2	XAXIS	40%
3	accordant media	37%	3	accuen	33%
4	accuen	37%	4	accordant media	32%
5	VARICK	25%	10	VARICK	32%

Q. Which of the following Agency Trading Desks have you used in the past year?
Q. And which of these Agency Trading Desks do you plan to use in the next year?
Base: Use Agency Trading Desk.

Advertiser Perceptions 51

Q115, Q116

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Q120

Q52a, Q52b

Brand characterization (full detail)

	DSP	DMP	Ad Networks	Supply Side Platform	Agency Trading Desk	Other/ Don't Know	Both DSP and DMP
Amazon Advertising	13%	12%	39%	19%	10%	10%	33%
Accordant Media	7%	10%	19%	10%	11%	37%	20%
Accuen	7%	13%	16%	9%	11%	34%	23%
AppNexus	14%	13%	21%	14%	11%	23%	26%
BrightRoll (Yahoo)	18%	10%	36%	12%	11%	16%	25%
Cadreon	7%	10%	14%	9%	13%	39%	22%
Centro	11%	11%	23%	10%	11%	30%	22%
Criteo	10%	10%	19%	10%	8%	32%	26%
DataXu	9%	12%	16%	12%	10%	28%	25%
DoubleClick Bid Manager	13%	8%	29%	13%	16%	13%	33%
Salesforce (formerly Krux)	7%	21%	17%	16%	12%	18%	29%
Marketo	8%	13%	18%	12%	12%	33%	23%
MediaMath	15%	11%	22%	11%	12%	19%	29%
Oracle/Bluekai	8%	22%	20%	14%	12%	13%	33%
ONE by AOL	10%	9%	30%	9%	9%	22%	29%
Sizmek (formerly Rocket Fuel)	11%	11%	20%	11%	9%	26%	27%
The Trade Desk	12%	8%	16%	8%	35%	15%	26%
Tremor Video	15%	8%	27%	12%	8%	24%	20%
Adobe Ad Cloud (formerly TubeMogul)	10%	11%	24%	13%	10%	19%	32%
Turn	13%	11%	18%	12%	8%	27%	25%
Varick Media	7%	10%	18%	13%	12%	34%	22%
Viant	10%	7%	20%	11%	10%	32%	25%
Xaxis	10%	11%	14%	8%	14%	33%	21%
Quantcast	11%	14%	22%	12%	9%	25%	22%
Adelphic	12%	9%	19%	9%	7%	37%	20%
Adara	5%	9%	16%	10%	9%	43%	20%
Bidtellect	11%	10%	18%	13%	12%	32%	21%
Videology	13%	8%	32%	8%	10%	25%	22%

Q100a. How would you characterize the following brand?
Base: Total Programmatic Respondents

Advertiser Perceptions 54

Q233a - NEW

DSP usage among ad type/format

Percent of Respondents

Top Brand By Format

	Display	Mobile	Video	Advanced TV	Audio	Native	Social	Digital OOO
ADARA	20%	23%	23%	17%	17%	22%	19%	9%
ADELPHIC	25%	30%	22%	16%	15%	20%	20%	10%
Adobe Advertising Cloud	37%	38%	42%	30%	18%	24%	22%	12%
amazon Platform	49%	49%	34%	29%	22%	30%	29%	16%
AppNexus	36%	32%	28%	16%	18%	23%	22%	10%
Bidtellect	25%	24%	24%	22%	16%	28%	18%	8%
BrightRoll	31%	34%	40%	23%	15%	24%	18%	9%
centro	33%	30%	32%	23%	16%	25%	23%	9%
criteo	31%	26%	19%	20%	16%	23%	18%	13%
DataXu	31%	31%	30%	18%	16%	24%	23%	7%
drawbridge	28%	28%	25%	19%	16%	21%	20%	10%
dstillery	28%	27%	25%	19%	18%	18%	18%	9%
	49%	46%	41%	25%	20%	30%	25%	13%
	40%	37%	33%	20%	17%	24%	24%	10%
DSP	37%	37%	38%	20%	17%	24%	15%	7%
quantcast	30%	30%	26%	18%	15%	17%	14%	10%
Sizmek	38%	37%	35%	20%	14%	22%	19%	12%
theTradeDesk	46%	37%	36%	26%	27%	26%	22%	11%
TREMOR VIDEO	20%	23%	46%	24%	14%	19%	18%	7%
TURN	34%	31%	33%	22%	20%	17%	17%	8%
VIANT.	31%	29%	28%	21%	17%	21%	23%	10%
videology	18%	19%	46%	24%	17%	23%	14%	10%

Q: For which type of advertising would you use each Demand Side Platform (DSP) you are familiar with?
Base: Familiar with Demand Side Platform (Variable Base)

Advertiser Perceptions 56

Q232

Q232

How the best brands are delivering ad tech implementation

Microsoft

Have great customer service and great protection.
- Agency President

They have multiple platform solutions.
- Marketer, Strategic Exec

They have quality products.
- Agency VP

IBM

Bring new insight into advertising.
- Marketer, Strategic Exec

Keep us in the loop with what is going on.
- Agency Supervisor

Sizmek (formerly Rocket Fuel)

Offer both a DMP and DSP platform that work very well with a client's marketing platform. They do a great job of optimizing the target audience to maximize engagement and interaction..
- Agency Director

They are upfront about possible roadblocks, set realistic expectations and go above and beyond to help garner the best results possible customer service has been excellent.
- Agency VP

Q: What do they do especially well?
Base: Total Programmatic Respondents

Advertiser Perceptions 58

Q52c

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Q216

Usage of demand side platforms (detail)

Percent of Respondents

	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Superv isor	Buyer/Planner/ Manager/Other
DoubleClick Bid Manager	38%	41%	35%	35%	40%	41%
amazon advertising Platform	38%	34%	42%	46%	28%	36%
BrightRoll	22%	24%	20%	22%	20%	26%
Adobe Advertising Cloud	20%	21%	18%	18%	21%	23%
theTradeDesk	18%	21%	14%	15%	18%	24%
AppNexus	17%	15%	19%	20%	16%	12%
TREMOR VIDEODSP	16%	20%	11%	18%	15%	11%
Mediamath	15%	15%	15%	14%	15%	18%
Sizmek (formerly Rocket Fuel)	15%	17%	12%	15%	15%	14%
DSP	13%	12%	14%	14%	14%	11%

Delta = 5%+   High   Mid   Low

Q: Which of these Demand Side Platforms (DSPs) you said you are familiar with have you used in the past year?
Base: Use Demand Side Platforms
Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

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Programmatic Intelligence Report Q1 2018

Demand Side Platforms

Q215

Consideration of demand side platforms (detail)

Percent of Respondents Rating 8-10 on a 10-Point Scale

	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Supervisor	Buyer/Planner/Manager/Other
DoubleClick Bid Manager	52%	50%	54%	52%	52%	49%
amazon advertising Platform	48%	39%	58%	59%	39%	37%
Adobe Advertising Cloud	39%	36%	43%	47%	34%	30%
theTradeDesk	39%	39%	38%	43%	33%	38%
BrightRoll	38%	36%	40%	45%	33%	28%
MediaMath	34%	30%	39%	41%	28%	28%
AppNexus	32%	29%	37%	42%	26%	21%
TREMOR VIDEODSP	32%	30%	35%	42%	25%	20%
Sizmek (formerly Rocket Fuel)	32%	32%	31%	41%	23%	24%
DSP	31%	27%	36%	40%	24%	20%

Delta = 5%+   High   Mid   Low

Q: How likely are you to consider each of the Demand Side Platforms (DSPs) you said you are familiar with for use in the coming year? (1 = Not at all Likely; 10 = Very Likely) Base: Use Demand Side Platforms

Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

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Q220

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Net promoter score (detail)

Net Promoter Score (Promoters Minus Detractors)	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Supervisor	Buyer/Planner/Manager/Other
MediaMath	33%	30%	38%	46%	41%	-6%
Sizmek (formerly Rocket Fuel)	26%	9%	54%	43%	16%	-3%
theTradeDesk	22%	19%	27%	20%	19%	31%
Adobe Advertising Cloud	22%	11%	36%	46%	14%	-12%
DoubleClick Bid Manager	22%	20%	24%	24%	18%	23%
amazon advertising Platform	16%	9%	22%	30%	-9%	5%
TREMOR VIDEODSP	14%	7%	29%	21%	7%	4%
AppNexus	10%	-2%	20%	9%	5%	25%
DSP	-5%	-12%	2%	5%	-28%	17%
BrightRoll	-13%	-5%	-23%	4%	-9%	-55%

Delta = 5%+

High   Mid   Low

Q. How likely would you be to recommend to a colleague this Demand Side Platform(s) (DSP's) you have used in the past year?
Base: Use Demand Side Platforms (Variable Base)
Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

Advertiser Perceptions 62

Q230

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Familiarity with demand side platforms (detail)

Percent of Respondents Rating 8-10 on a 10-Point Scale

	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Supervisor	Buyer/Planner/Manager/Other
DoubleClick Bid Manager by Google	47%	46%	47%	49%	44%	46%
amazon advertising Platform	42%	34%	51%	51%	36%	30%
BrightRoll	39%	36%	42%	46%	34%	31%
theTradeDesk	37%	38%	36%	41%	33%	36%
Adobe Advertising Cloud	35%	30%	41%	40%	33%	28%
MediaMath	33%	29%	37%	41%	25%	27%
Sizmek (formerly Rocket Fuel)	32%	33%	30%	38%	27%	24%
AppNexus	31%	27%	36%	43%	22%	20%
DSP	30%	26%	35%	40%	21%	22%
TURN	29%	26%	32%	36%	25%	18%

Q. How familiar are you with each of the following Demand Side Platforms (DSPs)?
Base: Use Demand Side Platforms
Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

Delta = 5%+   High   Mid   Low

Advertiser Perceptions 63

Q210

Usage intention of demand side platforms (detail)

Percent of Respondents Rating 8-10 on a 10-Point Scale

	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Supervisor	Buyer/Planner/Manager/Other
DoubleClick Bid Manager	44%	42%	46%	46%	42%	44%
amazon advertising Platform	41%	33%	51%	50%	33%	36%
Adobe Advertising Cloud	31%	29%	33%	38%	26%	23%
theTradeDesk	30%	30%	30%	36%	21%	31%
BrightRoll	29%	27%	31%	36%	22%	23%
MediaMath	27%	22%	32%	33%	17%	28%
AppNexus	26%	22%	30%	33%	21%	18%
DSP	25%	22%	30%	32%	20%	19%
Sizmek (formerly Rocket Fuel)	25%	23%	27%	31%	19%	20%
TREMOR VIDEODSP	25%	24%	26%	32%	21%	13%

Delta = 5%+   High   Mid   Low

Q. How likely are you to actually use each of the Demand Side Platforms (DSPs) you said you are considering for use in the coming year?
Base: Use Demand Side Platforms
Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

Advertiser Perceptions 64

Q225

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Preference of demand side platforms (detail)

Percent of Respondents Rating 8-10 on a 10-Point Scale

	Total Respondents	Company Type		Job Title		
		Agency	Marketer	VP+	Director/Supervisor	Buyer/Planner/Manager/Other
amazon advertising Platform	28%	23%	32%	33%	23%	23%
DoubleClick Bid Manager	23%	24%	23%	17%	25%	38%
theTradeDesk	8%	11%	4%	5%	8%	13%
Sizmek (formerly Rocket Fuel)	6%	7%	4%	7%	6%	1%
Adobe Advertising Cloud	5%	6%	4%	6%	7%	1%
AppNexus	5%	4%	6%	6%	5%	1%
MediaMath	3%	3%	3%	2%	4%	4%
BrightRoll	3%	2%	4%	3%	4%	1%
DSP	2%	2%	3%	1%	2%	5%
TREMOR VIDEO DSP	2%	1%	2%	2%	2%	0%

Delta = 5%+   High   Mid   Low

Q: If you were to only send out one RFP for an advertising campaign, which of these Demand Side Platforms (DSPs) would you choose?
Base: Intending to Use Demand Side Platform in the Coming Year (Fixed Base)
Job title color coding is a visual representation of each individual DMP's ratings comparatively by job title. Comparisons are made by partitioning each DSP's ratings into thirds (terciles).

Advertiser Perceptions 65

Q226

Q235

Q235

Agency vs. Marketer: product criteria

Highly Impressed with Demand Side Platforms (Among Top 10 Used)
Index of Percent Rating 8-10

Reporting Features			
Agency		Marketer	
DoubleClick Bid Manager	141	DoubleClick Bid Manager	153
theTradeDesk	115	theTradeDesk	125
MediaMath	113	TREMOR VIDEODSP	119
Adobe Advertising Cloud	108	Adobe Advertising Cloud	119
Sizmek	103	amazon advertising Platform	118
amazon advertising Platform	101	DSP	114
TREMOR VIDEODSP	99	MediaMath	110
DSP	97	AppNexus	101
BrightRoll	78	Sizmek	85
AppNexus	75	BrightRoll	81

Q: How would you rate each Demand Side Platform (DSP) on the following criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering Demand Side Platform in the Coming Year (Variable Base) *Small Base; Directional Data

Advertiser Perceptions 68

Q235

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Agency vs. Marketer: research & insights criteria

Highly Impressed with Demand Side Platforms (Among Top 10 Used)
Index of Percent Rating 8-10

Audience Analytics Reporting				Quality of Post Ad Campaign Evaluation, Insights, Recommendations			
Agency		Marketer		Agency		Marketer	
DoubleClick Bid Manager	122	DoubleClick Bid Manager	141	MediaMath	113	amazon advertising Platform	123
theTradeDesk	118	amazon advertising Platform	122	DoubleClick Bid Manager	108	theTradeDesk	116
Adobe Advertising Cloud	113	theTradeDesk	116	TREMOR VIDEODSP	108	DoubleClick Bid Manager	116
DSP	106	MediaMath	113	Sizmek (formerly Rocket Fuel)	103	MediaMath	104
MediaMath	100	AppNexus	111	theTradeDesk	97	TREMOR VIDEODSP	101
Sizmek (formerly Rocket Fuel)	96	Adobe Advertising Cloud	109	AppNexus	92	BrightRoll	100
AppNexus	95	TREMOR VIDEODSP	103	amazon advertising Platform	85	DSP	96
amazon advertising Platform	93	DSP	100	DSP	85	Sizmek* (formerly Rocket Fuel)	92
TREMOR VIDEODSP	85	Sizmek* (formerly Rocket Fuel)	98	Adobe Advertising Cloud	84	AppNexus	87
BrightRoll	74	BrightRoll	89	BrightRoll	83	Adobe Advertising Cloud	83

Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) research and insights efforts in communicating its value as an advertising vehicle at each stage in the campaign.
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering Demand Side Platform in the Coming Year (Variable Base) | *Small Base; Directional Data

Advertiser Perceptions 69

Q240

Q240

Q245

Agency vs. Marketer: sales criteria

Highly Impressed with Demand Side Platforms (Among Top 10 Used)
Index of Percent Rating 8-10

Responsiveness to Client Needs During and Post Implementation				Technology Expertise			
Agency		Marketer		Agency		Marketer	
MediaMath	112	amazon advertising Platform	127	DoubleClick Bid Manager	119	amazon advertising Platform	133
DoubleClick Bid Manager	108	theTradeDesk	120	MediaMath	107	DoubleClick Bid Manager	123
TREMOR VIDEODSP	101	TREMOR VIDEODSP	112	theTradeDesk	106	theTradeDesk	114
theTradeDesk	100	MediaMath	103	TREMOR VIDEODSP	105	TREMOR VIDEODSP	111
Sizmek (formerly Rocket Fuel)	95	Adobe Advertising Cloud	101	DSP	99	Adobe Advertising Cloud	104
Adobe Advertising Cloud	92	AppNexus	99	Sizmek (formerly Rocket Fuel)	92	MediaMath	97
amazon advertising Platform	92	Sizmek (formerly Rocket Fuel)	98	BrightRoll	91	AppNexus	93
DSP	89	DSP	94	Adobe Advertising Cloud	90	DSP	92
AppNexus	84	BrightRoll	93	amazon advertising Platform	87	BrightRoll	82
BrightRoll	72	DoubleClick Bid Manager	90	AppNexus	83	Sizmek (formerly Rocket Fuel)	77

Q: Based on your own experience, please rate each Demand Side Platform's (DSP's) sales team based on the following sales capabilities:
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering Demand Side Platform in the Coming Year (Variable Base) | *Small Base; Directional Data

Advertiser Perceptions 72

Q245

Q245

Q250
Meetings in person (Net) = 1) Had small group meeting in person with representative(s) from media brand OR 2) Had in person presentations on market topics or training
Video conference/phone/email (Net) = 1) Had technology enabled meetings/conferences on web, video, phone OR 2) Had email or phone conversations with sales rep(s)
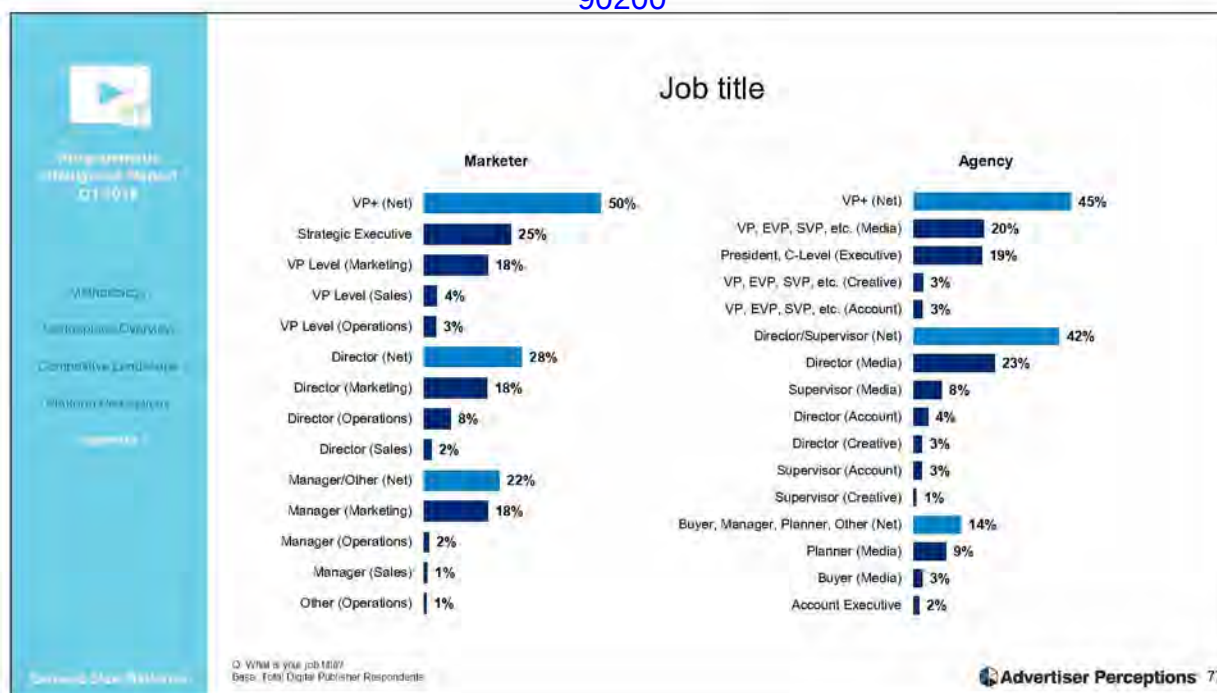
Q350

QS60

QS65

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